Entrepreneurial Development Management Information System Workgroup

Final Workgroup Review Meeting: February 28, 2012

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Agenda

- ❑ Error Messages and Upload Tool
- ❑ Data Accuracy and Transparency
- ❑ EDMIS Reporting Capabilities
- ❑ SBA 641 & 888 Forms & New Data Fields
- ❑ Collecting Individual Client Training Data
- ❑ Impact Measurements & Calculations
- ❑ Partner Collaboration & Unique Identifier

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Error Messages and Upload Tool

Issue – Partners receive EDMIS error report days after submission and error reports do not provide enough detail or help resolving the error.

#	Alternative Solutions
1	Create and post a help file for all EDMIS error descriptions, that include a standard error code (reference #) for all EDMIS errors, online with typical resolution.
2	Review EDMIS business logic and provide complete and accurate data and system requirement documentation to all partners/vendors online.
3	Provide partners/vendors with a similar XML feed or Excel spreadsheet containing error file information for easier diagnosis and import back into 3rd party system.
4	Provide EDMIS SBA admin users a summary report or capability to identify common global errors that would allow SBA to train end users on upload process or resolve internal system issues.
5	Provide real-time feedback on client records submitted – do not process all client records submitted in nightly batch process. Sending confirmations to clients on records submitted and failed.

Data Accuracy and Transparency

Issue – Partners question how data is received and interpreted by EDMIS and want EDMIS to be more transparent to allow partners to verify the accuracy of the system.

#	Alternative Solutions
1	Communicate and provide more EDMIS training to partner network on system reports and documentation surrounding impact measurements and calculations.
2	Provide better communication on how to resolve data discrepancies between EDMIS and 3rd party vendor system. Partners should first contact their software vendor to verify their system is in compliance with EDMIS requirements. If issue has to be escalated, then SBA will coordinate with the software vendor to triage the issue.

Comments/Next Steps:

❑ EDMIS currently gives users access to the Management Reports which show quarterly and annual summaries and Operational Reports which show client and field level history detail. SBA needs to educate partners on these functions

❑ Users often share or rely on 1 user account in EDMIS. Anyone entering, uploading or reporting data should have their own EDMIS user account.

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EDMIS Reporting Capabilities

Issue – Current canned reports and report filters don't allow the Agency to effectively measure the program's or partner's performance.

#	Alternative Solutions
1	Modify existing Management Report to offer summary and service center detail and filter on one or many Partner Types, Partners and/or Locations, and SBA Regions and/or Offices
2	Build a new reporting interface to allow users to build simple ad hoc reports on reported client data and design new canned reports to meet congressional reporting requirements.
3	As new data requirements present themselves, SBA should provide better communication with the partners/vendors to ensure new data requirements are being shared between all parties.
4	Enhance system to allow for more 'print friendly' reporting options.

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SBA 641 & 888 Forms & New Data Fields

Issue – Outdated forms cause partners to question why certain data elements are being captured and the meaning behind collecting duplicative information.

#	Alternative Solutions
1	Continue to use forms, as mandated by OMB, but consolidate duplicative information and remove unnecessary data fields. Forms should be used as templates or guidelines on what data is required by SBA and not templates for how data is captured.
2	Update forms to add additional needed data elements for more detailed client tracking.

Comments/Next Steps:

❑ Partners voiced a concern that adding new data fields would only cause more push back from clients receiving TA and don't recommend the SBA mandating any new fields. Also unless these fields were mandatory, reporting on these fields would only reflect a percentage of the partners collecting them and not show a true measurement throughout the program.

❑ Form an internal group to review SBA 641 data fields and determine which fields can be added, consolidated and removed. IN PROGRESS

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Collecting Individual Client Training Data

Issue – SBA cannot analyze program training data in aggregate form and is requesting that partners provide individual client level training data for a "direct line of sight back to the customer".

#	Alternative Solutions
1	Modify ED system and XML Schema to allow users to collect/provide general event information and the ability to add clients (individual client data) to the event they participated in, similar to how counseling data is captured. Additional data fields may need to be captured during this process. Provide partners and vendors with updated requirement documentation.

Comments/Next Steps:

❑ The majority of the partners using larger 3rd party vendor systems already collect individual client training data.

❑ Some partners using smaller or independent software solutions might incur larger development costs to comply with this new requirement.

❑ Overall, the majority of partners agree that this can be done.

❑ Main question that needs to be answered is whether or not SBA will start tracking impact measurements from training clients???

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Impact Measurements & Calculations

Issue – Should impact measurements like Jobs Created, Retained and Business Starts continue to be calculated or should this be self-reported from the client?

#	Alternative Solutions
1	Continue to calculate impact measurements like jobs created by calculating the change over two periods of time.
2	Stop calculating impact measurements and allow the partners to self-report data to EDMIS.

Comments/Next Steps:

❑ Partners question calculations and would like to see EDMIS allow self-reported measurements.

❑ SBA is opting to continue calculating impact measurements as they are calculated today.

❑ Need final decision along with any new impact measurements that come from collection of individual client training data.

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Impact Measurements & Calculations

❑ SBA Impact Measurements

    ❑ **Jobs Created** - Difference between current fiscal year last session and previous fiscal year last session total employee number. Any business reporting losing employees (where a the difference is negative), 0 jobs created will be used for that business.

    ❑ **Jobs Retained –** The lesser of total number of employees from the last session of last fiscal year or the total number of employees from the last session of the current fiscal year. Business must have a session in both the current and last fiscal year.

    ❑ **Business Starts** - Any change from 'No' to 'Yes' on the Client Business Indicator on any active session in the current fiscal year will result in a "Business Start" for the quarter when that change took place.

    ❑ **Capital Infusion –** The aggregate amount of total amount of SBA loans, total amount of non-SBA loans, and the amount of equity capital received per business.

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Impact Measurements by Funding Source

Client #	Session Number	FY / Quarter	Funding Source	# of Employees	Session Length
123	1	2011 / Q3	Veteran Assistance	1	1
123	2	2012 / Q1	Jobs Act	1	2
123	3	2012 / Q1	Core	5	1
123	4	2012 / Q1	Core	5	1
123	5	2012 / Q1	Jobs Act	8	4
123	6	2012 / Q1	Jobs Act	11	1
TOTAL					10
				Jobs Created = 10	

Jobs Created by Funding Source = (Total Funding Source Session Length/Total Session Hours) * Total Jobs Created

Example: Jobs Created by Jobs Act Fund $ = (7/10) * 10 ---> **7 Jobs**

Partner Collaboration & Unique Identifier

Issue – Clients often visit multiple partners seeking technical assistance. How can SBA show Congress that although the partner network programs are unique and different, they still collaborate to help clients find the assistance they need to become successful? How does SBA show an accurate total of unique clients utilizing multiple partners?

Comments:

❑ Although the partners belong to parent network, each partner operates independently and their collaboration with other partners is highly influenced by the market they operate in.

❑ In many markets, the partner organization structure is highly personality and skill dependent amongst the counselors at those various organizations.

❑ Collaboration is also highly dependent on "Local Leadership" which helps coordinate amongst all the partners and helps the flow of communication.

❑ Without a unique way of identifying clients from one partner to another – can't show client sharing.

Partner Collaboration & Unique Identifier

Next Steps:

❑ Continue discussions with partners - SBA to define what metrics exemplify collaboration between partners and update system requirements.

❑ SBA identifying client information required or other process to establish a centralized unique identifier for all partner clients.

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